17th Annual Report on Government of Canada Public Opinion Research Activities

2017 to 2018
Fiscal Year

Government of Canada / Gouvernement du Canada

Canada

17th Annual Report on Government of Canada Public Opinion Research Activities

2017 to 2018 fiscal year

About the report

Public Services and Procurement Canada is responsible for publishing an annual report on the government's public opinion research activities.

This 17th annual report provides information on public opinion research studies contracted during the Government of Canada's fiscal year between April 1, 2017 and March 31, 2018 from departments listed under Schedules I, I.1 and II of the Financial Administration Act.

Previous annual reports on public opinion research activities can be viewed on the Government of Canada Publications website.

Cette publication est aussi disponible en français sous le titre : 17e rapport annuel sur les activités de recherche sur l'opinion publique au gouvernement du Canada

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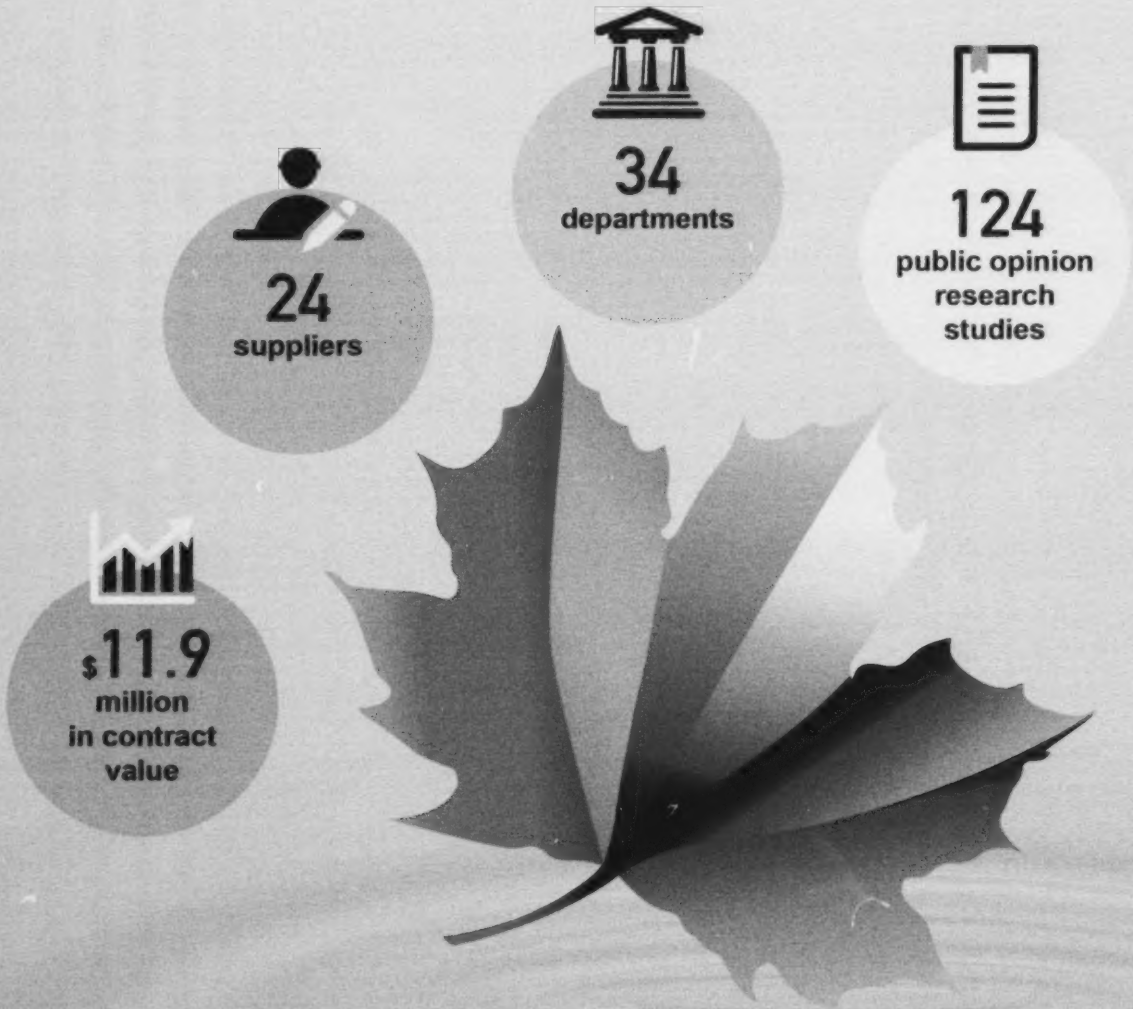
The year at a glance

Public opinion research activities (both custom and syndicated research studies) contracted between April 1, 2017 and March 31, 2018



in the fiscal year ending

March 31, 2018

Government of Canada / Gouvernement du Canada

Canada

Introduction

Government policies and programs, informed by public opinion research, are intended to reflect the will of the people.

Through research we engage Canadians, get feedback on programs or proposed initiatives, and listen to their comments and suggestions. In doing so, we begin to understand how things are at that moment and what Canadians expect from government in the future. Public opinion research, in the end, has much more to do with people than data. It is essential to participatory democracy, and is one factor among others that influences the actions of government.

This 17th annual report provides information on public opinion research projects contracted in the 2017 to 2018 fiscal year. It was a year marked by new research studies that helped the government improve its programs and services after hearing from the Canadian public.

The public opinion research process strengthens the bond between Canadians and their government. It also gives citizens a say in how the government meets their needs, and links the government to their interests and concerns.

The year in review

Public opinion research projects undertaken in the 2017 to 2018 fiscal year were similar in number to those of the previous year. While the subject matter changes from year to year, the need for research to stimulate discussion and aid decision-making continues. In all, there were 124 projects contracted worth $11.9 million. This includes the purchase of 5 syndicated research studies that were shared among federal departments.

The projects show how public opinion research informs the government of the views of Canadians on a range of topics. As examples:

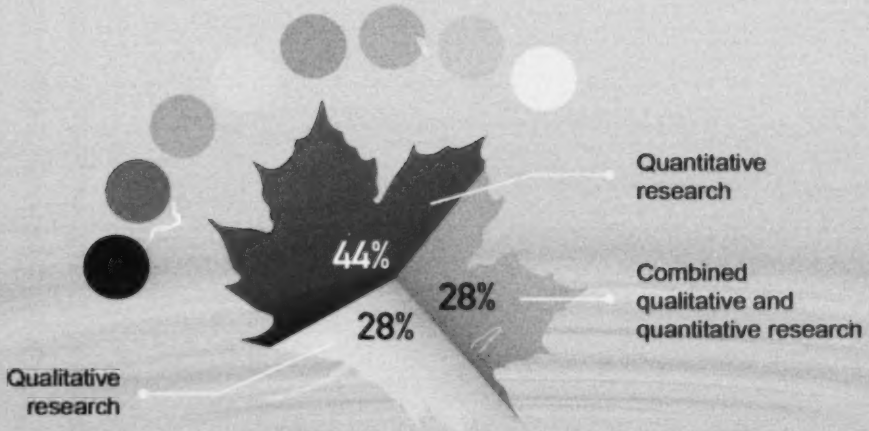
- Canada Revenue Agency spoke to business owners who had installed bitcoin ATMs
- Employment and Social Development Canada held focus groups to explore the need for, and barriers to, continuing education and skills development
- Health Canada obtained feedback on food safety issues and conducted a baseline survey on opioid awareness, knowledge and behaviours
- Transport Canada contacted a sample of the general public and a sample of Indigenous peoples, with a focus on coastal communities, to examine marine safety issues
- The Department of Justice Canada surveyed Canadians' attitudes towards the criminal justice system

Additional public opinion research projects were undertaken during the 2017 to 2018 fiscal year. For a full list of projects, turn to Appendix II of this report. Final reports for all completed research studies can be found on the Library and Archives Canada website.

We heard from many Canadians this year

Through the use of quantitative and qualitative techniques such as surveys and focus groups, the government obtained insightful and valuable information from Canadians. The information came from the general population and also from target audiences such as professionals, parents, caregivers, Indigenous people, youth and veterans.

Breakdown of research methods by number of projects



The research target audiences included the general population and...

- Agricultural producers
- Caregivers
- Family doctors
- Food producers
- Homeowners
- Indigenous peoples
- Librarians
- Newcomers and immigrants
- Parents and guardians
- Pregnant women
- Professionals
- Security officers
- Senior executives
- Smokers and vapers
- Teachers
- Veterans
- Youth

The knowledge gained by using these research methods helped the government better understand many points of view and what mattered most to Canadians.

Selected research findings

A small sample of things we learned through listening to Canadians this year:

Drinking water quality in First Nations communities

Health Canada conducted interviews on the topic of drinking water quality with 828 residents of First Nations communities and 721 residents from other small communities across Canada.

Compared to residents of other small communities, First Nations residents had a significantly higher demand for information to reassure them about their tap water quality:

66% of First Nations community residents interviewed would like to know more about what to do in case of a Drinking Water Advisory or a Boil Water Advisory while three-quarters said that more information about water quality testing procedures (74%), and information about the quality of tap water in their community (72%), would make them feel safer.

These findings will help guide outreach activities in the future.

Source: Perceptions of Drinking Water Quality in First Nations Communities and General Population (registration number: POR 052-17)

Attitudes towards electric vehicles

Most Canadians (74%) want assurance of a driving range of 250 km or more on a single full charge and 39% want a 450 km driving range per full charge.

78% of current electric vehicle owners surveyed were very interested in buying another.

75% of respondents agreed that there are too few public charging stations.

Source: Consumer Attitudes Towards Electric Vehicles (registration number: POR 062-17)

How Canadians connect to government information

Canadians expect to receive information about government programs and services primarily through the Internet (84% reported).

41% of Internet users in Canada rely on social media (Facebook, YouTube, LinkedIn) to look for information on federal government programs, services and announcements.

Reliance on social media was equally high among linguistic minorities: both among Francophones outside Quebec (42%) and Anglophones in Quebec (47%).

Source: Media Habits of Minority Language Canadians (registration number: POR 084-16)

Helping Canadians make use of government services

58% of Canadians are very or somewhat comfortable with their personal information being shared automatically among federal departments as part of a single account approach for accessing government programs and services.

Source: Service Delivery and Privacy: Public Opinion Research (registration number: POR 092-17)

Project details are listed in Appendix II of this report.

Custom research studies

Public opinion research is one way of evaluating government policies, programs and communications efforts.

Custom research studies allow the government to obtain data and information on specific topics. They are designed to get answers to a variety of questions from one or many audiences.

The following section lays out a few examples of research projects contracted during the fiscal year and highlights the business volume by department and supplier. A full list of custom research studies is available in the Appendices of this report.

- Examples of custom research studies
- Volume of custom research studies by department
- Volume of custom research studies by supplier

Examples of custom research studies

Survey of Canadians' knowledge and behaviours related to food safety

Each year, about 4 million Canadians are affected by domestically acquired food-borne illnesses (food poisoning, from pathogens such as norovirus, salmonella and listeria). Health Canada's survey set out to assess public awareness, attitudes, knowledge and behaviours related to food safety. The information gathered by the survey will be used to help Canadians better understand food safety and the precautions that can be taken to protect against food-borne illnesses.

The survey found a clear demand for more information on safe food handling, particularly from among "at-risk" groups (for example, older adults, pregnant women and individuals with compromised immune systems).

The survey report recommends that public education efforts focus on:

- increasing awareness of the types of foods that are commonly associated with food-borne illnesses such as canned and raw seafood, deli meats, raw eggs and unpasteurized cheeses
- providing information on self-protective behaviours for food handling, preparation and storage including washing reusable bags, using food thermometers to check cooking temperatures and properly storing, defrosting and reheating foods
- developing targeted communications for "at-risk" groups and encouraging them to take extra care to protect themselves from food poisoning
- raising awareness of appropriate cooking techniques. For example, some consumers who purchase frozen breaded chicken products believe these products only need to be re-heated and not fully cooked

Source: Survey of Canadians' Knowledge and Behaviours Related to Food Safety (registration number: POR 035-17)

Public opinion research on drug-impaired driving

In step with the government's plan to regulate and implement recreational cannabis, Public Safety Canada conducted research to assess public awareness of the risks associated with drug-impaired driving.

The research included an online survey of 2,000 Canadians, and 8 focus groups with younger Canadians aged 16 to 24. The information gathered through this research helped with the development of a national public awareness campaign to combat drug-impaired driving.

The survey results show that many cannabis users (especially young users) seem to underestimate the dangers of drug-impaired driving. Some key findings from the research included:

- over one-quarter (28%) of people who have ever smoked cannabis reported they have operated a vehicle under the influence of drugs
- 1 in 3 (32%) of Canadians aged 16 to 24 have been a passenger in a vehicle with a cannabis-impaired driver

- 50% of Canadians aged 16 to 24 see cannabis-impaired driving as more socially acceptable than driving under the influence of alcohol

Among the many comments by participants in the focus groups with younger Canadians include:

- "I personally wouldn't want to go in a car if someone's high, but I think it also depends, it affects people in different ways"

- "I don't see it as bad as drinking and driving"

Source: Public Opinion Research on Drug-impaired Driving (registration number: POR 019-17)

Survey on opioid awareness, knowledge and behaviours

Health Canada conducted an online survey to assess Canadians' baseline knowledge, awareness levels and behaviours regarding opioids.

According to the survey, 22% of respondents reported having taken opioids at some point in the past year. Among those respondents, 77% indicated that they always or usually had a prescription. By contrast, 1 in 5 (20%) only sometimes, rarely or never had a prescription.

Respondents seemed to be knowledgeable about opioids. However, they appeared less familiar with fentanyl, a potent synthetic opioid that is often illegally produced and sold on the streets, frequently mixed with other drugs.

The survey also provided insight into Canadians' views on the opioid crisis and the stigma related to opioid use and opioid use disorder.

Source: Baseline Survey on Opioid Awareness, Knowledge and Behaviours for Public Education (registration number: POR 016-17)

Survey findings will inform a campaign to help prevent opioid overdoses and related deaths and harms related to problematic use of opioids. The survey also provides a baseline of information for future studies.

Oceans Protection Plan and confidence in marine safety

The Oceans Protection Plan is a national strategy designed to improve marine safety and responsible shipping, protect Canada's marine environment, and offer new possibilities for Indigenous peoples and coastal communities. Transport Canada recognized that public opinion research was needed to assess confidence in Canada's marine safety system.

Roughly 7 in 10 (69%) Canadians have some confidence in Canada's marine safety system, as opposed to 15% who say they not confident. The results suggest a recent bolstering in confidence, as 1 in 5 Canadians feel their confidence in Canada's marine safety system has increased over the past 5 years, compared with 13% who feel it has eroded during that time.

Results are similar for Indigenous peoples in Canada. However in coastal communities, lowered confidence exceeds bolstered confidence.

Source: Oceans Protection Plan: Canadians Confidence in Marine Safety (registration number: POR 048-17)

Public opinion research on the online consumption of copyrighted content

Innovation, Science and Economic Development Canada, in partnership with Canadian Heritage, conducted a public opinion research survey of Canadians' online consumption of copyrighted content.

The purpose of the survey was to generate data to better understand the prevalence of copyright infringement in Canada and the attitudes and conditions that drive behaviour in this regard. The survey looked at online consumption of 6 types of copyrighted content: music, movies, TV shows, computer software, video games and e-books. A total of 3,301 Canadians aged 12 years and over were surveyed online and by telephone in November 2017. The survey adopted the same methodology used in the United Kingdom and Australia, thus allowing for country comparisons for similar surveys.

The survey found that Canadians are active consumers of copyrighted content online. For example, the survey found:

- 80% of Internet users consumed digital content online during the 3 month period covered by the survey
- a large majority (74%) of Canadians who consumed online content (any or all types of content) did so without infringing copyright laws
- conversely, 26% of these online consumers infringed copyright laws at least once during the three-month period covered by the survey

Source: Study of Online Consumption of Copyrighted Content: Attitudes Toward and Prevalence of Copyright Infringement in Canada **(registration number: POR 011-17)**

This research was undertaken in part to support the Parliamentary review of the Copyright Act. The research findings will help policy makers evaluate how Canada's Copyright Act is keeping pace with an ever-changing technological environment and evolving marketplace. The research results should also provide the opportunity to raise awareness, educate and promote a dialogue among Canadians about copyright norms and values.

Survey of understanding and awareness of sport-related concussions

Sport-related concussions are a recognized public health concern, but how much do Canadians know about this issue? To learn more about Canadians' awareness of concussions and their knowledge of potential preventive measures and treatment, the Public Health Agency of Canada surveyed 1,895 adults and 391 health care providers. Particular emphasis was put on sport-related concussions that have an effect on children and youth.

At the time when the research was conducted, there were no definitive concussion guidelines and no comprehensive approach to address concussions. Hence, the research findings helped inform the development of tools and resources to support concussion recognition, prevention and management.

The survey found that only 40% of respondents could recognize the basic signs and symptoms of a concussion. It also highlighted that just half of the respondents (46%) knew how to provide immediate assistance to people who sustained a sport-related concussion, or knew where to get information on concussions (51%).

Source: Baseline Survey on Understanding and Awareness of Sport-related Concussions **(registration number: POR 021-17)**

Volume of custom research studies by department

A total of 34 departments contracted custom public opinion research studies in the April 1, 2017 to March 31, 2018 fiscal year.

Note: The amounts reported represent the contract value. This includes amendments to increase or reduce the contract value during the 2017 to 2018 fiscal year.

Table 1: Volume of custom research studies by department in the April 1, 2017 to March 31, 2018 fiscal year

Department	Number of research studies	Contract value
Agriculture and Agri-Food Canada	2	$156,413.90
Atlantic Canada Opportunities Agency	1	$24,869.04
Canada Border Services Agency	1	$207,284.94
Canada Revenue Agency	6	$410,690.59
Canada School of Public Service	1	$142,434.24
Canadian Food Inspection Agency	2	$182,327.36
Canadian Heritage	7	$325,743.98
Canadian Radio-television and Telecommunications Commission	2	$224,899.61
Canadian Security Intelligence Service	1	$57,325.35
Canadian Transportation Agency	1	$24,860.00
Department of Finance Canada	3	$396,998.73
Department of Justice Canada	1	$245,876.70
Employment and Social Development Canada	8	$473,747.10
Financial Consumer Agency of Canada	2	$81,093.32
Global Affairs Canada	2	$137,493.36
Health Canada	26	$2,887,486.80
Immigration, Refugees and Citizenship Canada	5	$518,066.07

Innovation, Science and Economic Development Canada	4	$389,547.16
Library and Archives Canada	1	$39,988.44
National Defence	3	$155,062.10
National Energy Board	1	$11,955.40
Natural Resources Canada	5	$438,003.43
Office of the Superintendent of Financial Institutions Canada	3	$158,106.39
Offices of the Information and Privacy Commissioners of Canada	1	$58,737.40
Parks Canada	5	$598,954.59
Privy Council Office	4	$1,428,029.26
Public Safety Canada	1	$175,633.64
Public Services and Procurement Canada	8	$298,767.77
Royal Canadian Mounted Police	2	$169,596.22
Shared Services Canada	1	$113,762.75
Status of Women Canada	1	$43,567.15
Transport Canada	1	$187,265.86
Treasury Board of Canada Secretariat	1	$209,862.47
Veterans Affairs Canada	6	$354,843.08
Total	**119**	**$11,329,294.20**

Volume of custom research studies by supplier

In total, the government awarded contracts for custom public opinion research services to 22 research firms. These firms delivered various research services, ranging from survey data collection to full qualitative and/or quantitative research services (research design, data collection, analysis and reporting).

Note: The amounts reported represent the contract value. This includes amendments to increase or reduce the contract value during the 2017 to 2018 fiscal year. The negative figures (written with a minus sign in front) indicate that these contracts were issued in a previous fiscal year, but have been amended downward in the reporting year.

Table 2: Volume of custom research studies by supplier in the April 1, 2017 to March 31, 2018 fiscal year

Supplier	Number of research studies	Contract value
AC Nielsen Company of Canada	3	$118,392.36
Advitek Inc.	1	$24,860.00
Corporate Research Associates Inc.	13	$721,853.41
Ekos Research Associates Inc.	19	$2,122,258.94
Elemental Data Collection Inc.	2	$85,206.75
Environics Research Group Limited	11	$822,869.58
Foreign Policy	1	-$12,499.00
Forum Research Inc.	1	$407,794.40
Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	3	$359,966.93
Ipsos-Reid Corporation	5	$1,275,705.76
Kantar TNS Inc.	6	$594,981.48
Leesman Limited	1	$18,150.00
Léger Marketing	9	$671,999.64
NRG Research Group	1	$47,121.00

Phoenix SPI	13	$1,423,934.84
Pollara	2	$134,809.00
Quorus Consulting Group Inc.	7	$635,073.92
RIWI Corp.	1	$24,860.00
Sage Research Corporation	3	$191,049.10
SOM Inc.	1	$3,542.55
The Earnscliffe Strategy Group Inc.	15	$1,633,633.54
Vox Pop Labs Inc.	1	$23,730.00
Total	**119**	**$11,329,294.20**

Syndicated research studies

The Government of Canada purchased subscriptions to 5 syndicated public opinion research studies in fiscal year 2017 to 2018.

Syndicated studies are an economical way of obtaining information because research costs are shared among subscribers. Syndicated studies, covering a variety of broad issues or themes, are developed by research firms who own the data.

These subscriptions allowed federal departments to access the collected information while the intellectual property rights remained with the supplier firm.

Subscriptions to these 5 syndicated research studies were purchased by the Government of Canada and made available government-wide.

Table 3: Volume of syndicated research studies in the April 1, 2017 to March 31, 2018 fiscal year

Syndicated research study title	Supplier	Contract value
Canadian Millennials Report	Abacus Data Inc.	$65,088.00
Earnscliffe Linguistic Minority Insights	The Earnscliffe Strategy Group Inc.	$178,540.00
Taking Care of Business	Institute for Citizen-Centred Service	$45,200.00
The Public Lens: (In)Tolerance in Canada	Pollara	$138,425.00
The Public Lens: Legalizing Marijuana	Pollara	$100,005.00
Total		**$527,258.00**

Trends

The volume of research fluctuates from year to year depending on the government's needs. The tables represent a summary of past research studies and contract values.

Table 4: Number of research studies and contract values by fiscal year

Period	Number of research studies	Contract value (in millions of dollars)
April 1, 2017 to March 31, 2018	124	$11.9
April 1, 2016 to March 31, 2017	129	$12.5
April 1, 2015 to March 31, 2016	51	$3.8
April 1, 2014 to March 31, 2015	54	$4.1
April 1, 2013 to March 31, 2014	81	$4.9
April 1, 2012 to March 31, 2013	72	$4.3
April 1, 2011 to March 31, 2012	100	$6.5
April 1, 2010 to March 31, 2011	136	$7.9
April 1, 2009 to March 31, 2010	148	$8.3
April 1, 2008 to March 31, 2009	131	$8.1
April 1, 2007 to March 31, 2008	446	$24.8
April 1, 2006 to March 31, 2007	562	$31.4

Table 5: Historic averages of the number of studies and contract values

Period	Yearly average number of research studies	Yearly average contract value (in millions of dollars)
In the last 5 years (April 1, 2013 to March 31, 2018)	88	$7.4
In the last 10 years (April 1, 2008 to March 31, 2018)	103	$7.2
In the last 15 years (April 1, 2003 to March 31, 2018)	251	$14.0
In the last 20 years (April 1, 1998 to March 31, 2018)	326	$15.7

Table 6: Procurement methods for research studies in the April 1, 2017 to March 31, 2018 fiscal year

Procurement methods	Number of research studies	Contract value	% Contract value
Standing offers	110	$9,879,646.14	83.3%
Public tenders (buyandsell.gc.ca)	3	$1,346,026.06	11.4%
Other methods	11	$630,880.00	5.3%
Total	**124**	**$11,856,552.20**	**100%**

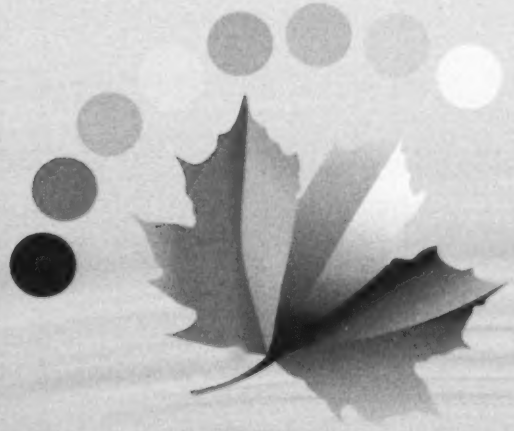
Appendices

In this section:

- **Appendix I**: Managing public opinion research activities in the Government of Canada
- **Appendix II**: List of custom research studies by department
- **Appendix III**: Standing offers for public opinion research services
- **Appendix IV**: Key public opinion research-related laws, regulations and policies

Appendix I: Managing public opinion research in the Government of Canada

Roles and responsibilities of stakeholders in public opinion research activities



Departments
are responsible for the management, research content and overall quality of the research produced

Treasury Board of Canada Secretariat
sets policies and oversees compliance

Privy Council Office
performs a central role in the leadership and strategic direction

Public Services and Procurement Canada
provides research advice and is the contracting authority

Library and Archives Canada
makes public opinion research reports available to Canadians

Suppliers
conducts public opinion research studies and provides reports on the research findings

Appendix II: List of custom research studies by department

Below is a list of custom research studies contracted by department.

A registration number is assigned to each study, which can then be used to find it in the public opinion research reports collection. Please note that some of these studies may have not been completed at the time of publishing this report but will be posted within 6 months after the completion of data collection.

Note: The amounts reported represent the contract value. This includes amendments to increase or reduce the contract value during the 2017 to 2018 fiscal year. The negative figures (written with a minus sign in front) indicate that these contracts were issued in a previous fiscal year, but have been amended downward in the reporting year.

Table 7: List of custom public opinion research studies contracted in the April 1, 2017 to March 31, 2018 fiscal year

Research study title by department	Registration number	Supplier	Contract value
Agriculture and Agri-Food Canada			
2017 to 2018 Qualitative Research on Agricultural Education	POR 095-17	The Earnscliffe Strategy Group Inc.	$149,972.90
Food Policy Survey Questionnaire Design	POR 001-17	Phoenix SPI	$6,441.00
Atlantic Canada Opportunities Agency			
Atlantic Canada Opportunities Agency Client Satisfaction Survey 2018	POR 098-17	Phoenix SPI	$24,869.04
Canada Border Services Agency			
Baseline Survey for the Canadian Border Services Agency	POR 042-17	Ekos Research Associates Inc.	$207,284.94
Canada Revenue Agency			
2017 Annual Corporate Research	POR 043-17	Léger Marketing	$156,578.45

Awareness Among Taxpayers	POR 106-17	Quorus Consulting Group Inc.	$68,948.08
Canada Caregiver Credit Advertising Campaign: Advertising Campaign Evaluation Tool (ACET)	POR 078-17	Environics Research Group Limited	$38,060.66
File My Return Invitation Letters	POR 031-17	NRG Research Group	$47,121.00
Qualitative Research on Bitcoin Automated Teller Machines (ATMs) in Canadian Business	POR 066-17	Sage Research Corporation	$32,973.40
Qualitative Research on No Reply to Validation and Compliance Questionnaire	POR 093-17	Pollara	$67,009.00
Canada School of Public Service			
Canada School of Public Service: 2017 Rebranding Project	POR 079-17	Ekos Research Associates Inc.	$142,434.24
Canadian Food Inspection Agency			
Public Opinion Research with Canadians on Food Safety 2017 to 2018: Focus Groups	POR 054-17	The Earnscliffe Strategy Group Inc.	$75,423.71
Public Opinion Research with Food Businesses to Support Compliance with Food Safety Regulations: 2017 to 2018	POR 050-17	Ekos Research Associates Inc.	$106,903.65
Canadian Heritage			
2017 Canada Day in the Capital Satisfaction Survey	POR 008-17	Quorus Consulting Group Inc.	$29,925.23
Appreciation and Perception of Canada's Two Official Languages	POR 110-17	Vox Pop Labs Inc.	$23,730.00
Assessing the "Overarching Canada 150" Advertising Campaign": Advertising Campaign Evaluation Tool (ACET) Survey	POR 009-17	Corporate Research Associates Inc.	$15,991.76
Canada 150 Wave 2: Mid-Point Survey	POR 006-17	Quorus Consulting Group Inc.	$82,909.23
Canada 150 Wave 3: Final Survey	POR 055-17	Quorus Consulting Group Inc.	$82,909.23

Creative Concept Testing for the Umbrella: Canada 150 Advertising Campaign Summer 2017	POR 003-17	Corporate Research Associates Inc.	$30,928.10
Focus Groups on Canadians' Participation in the Arts	POR 109-17	Corporate Research Associates inc.	$59,350.43
Canadian Radio-television and Telecommunications Commission			
Future of Audio and Video Programming in Canada	POR 051-17	Ekos Research Associates Inc.	$144,995.95
Wireless Code Public Opinion Research: Winter 2017	POR 068-17	Kantar TNS Inc.	$79,903.66
Canadian Security Intelligence Service			
Attitudes Towards the Canadian Security Intelligence Service	POR 101-17	Ekos Research Associates Inc.	$57,325.35
Canadian Transportation Agency			
Airport Surveys Consultation on Consumer Protection for Air Travellers	POR 053-17	Advitek Inc.	$24,860.00
Department of Finance Canada			
Focus Groups on the Economy Through Perception Analyzer	POR 108-17	Corporate Research Associates Inc.	$71,818.28
Qualitative and Quantitative Research on the Economy: Winter 2017 to 2018	POR 060-17	Environics Research Group Limited	$161,545.93
Survey and Focus Groups on the Economy: Summer 2017	POR 010-17	Quorus Consulting Group Inc.	$163,634.52
Department of Justice Canada			
National Justice Surveys 2017: Reforming Canada's Criminal Justice System	POR 012-17	Ekos Research Associates Inc.	$245,876.70
Employment and Social Development Canada			
2016 to 2017 Client Experience Survey	POR 092-16	Ipsos-Reid Corporation	$12,298.92
2016 to 2017 Employment and Social Development Canada: Exploratory Youth Research	POR 117-16	Corporate Research Associates Inc.	-$14,432.56

2017 to 2018 Education and Skills: Youth Campaign Research and Evaluation	POR 015-17	Corporate Research Associates Inc.	$112,169.45
2017 to 2018 Regular Collection of Client Experience Data: Pilot Phase	POR 107-17	Kantar TNS Inc.	$119,964.64
Adult Upskilling Exploratory Research	POR 102-17	Corporate Research Associates Inc.	$74,664.75
Assessment of National Work Plan for Labour Market Information Products	POR 103-17	The Earnscliffe Strategy Group Inc.	$107,915.00
Naming of New Skills Innovation Organization	POR 097-17	Léger Marketing	$30,408.30
Youth Services Initiative Branding Research	POR 014-17	AC Nielsen Company of Canada	$30,758.60
Financial Consumer Agency of Canada			
Financial Consumer Agency of Canada Financial Wellbeing Survey (Canada) 2017 to 2018	POR 086-17	Ipsos-Reid Corporation	$33,448.00
Financial Literacy Collaboration Survey 2017	POR 023-17	AC Nielsen Company of Canada	$47,645.32
Global Affairs Canada			
Consular Policy and Programs: Global Affairs Canada	POR 090-17	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	$149,992.36
Public Opinion Research on Canada and United States Relations	POR 087-16	Foreign Policy	-$12,499.00
Health Canada			
2018 Evaluation Survey of National Radon Awareness and Action	POR 081-17	Environics Research Group Limited	$97,709.97
Baseline and Post-Campaign Advertising Campaign Evaluation Tool (ACET) Survey for the Vaccination Campaign	POR 105-17	Ipsos-Reid Corporation	$49,941.48

Baseline Survey on Opioid Awareness, Knowledge and Behaviours for Public Education	POR 016-17	The Earnscliffe Strategy Group Inc.	$99,690.86
Baseline Survey on Understanding and Awareness of Sport-related Concussions	POR 021-17	Kantar TNS Inc.	$120,546.85
Canadians' Awareness, Knowledge and Attitudes Related to Sexually Transmitted and Blood Borne Infections	POR 056-17	Ekos Research Associates Inc.	$183,048.70
Chemicals Management and Environmental Health Issues Focus Groups	POR 018-17	Ekos Research Associates Inc.	$57,671.81
Consumer Research on Front of Package Nutrition Labelling	POR 073-17	Léger Marketing	$89,722.00
Evaluating Various Components of Employee Assistance Services: Client Services 2017 to 2018	POR 041-17	Elemental Data Collection Inc.	$24,521.00
Evaluation of Possible Labelling Elements for Vaping Products	POR 099-17	Corporate Research Associates Inc.	$95,897.45
Focus Testing Concepts for Cannabis Videos and Advertising Campaign Evaluation Testing: Pre and Post Advertising Campaign Evaluation Tool (ACET) Survey	POR 017-17	Quorus Consulting Group Inc.	$105,465.73
Focus Testing Creative Concepts for the Cannabis Public Education Campaign	POR 037-17	The Earnscliffe Strategy Group Inc.	$103,395.00
Focus Testing Creative Concepts for the Vaccination Advertising Campaign	POR 063-17	Corporate Research Associates Inc.	$68,980.85
Healthy Eating Indicators Survey: Select Key Health Portfolios Indicators (SKHPI)	POR 112-17	Environics Research Group Limited	$19,955.80
Healthy Eating Strategy: Dietary Guidance Transformation (Focus Groups on Canada's Food Guide Visual and Brand)	POR 046-17	The Earnscliffe Strategy Group Inc.	$219,385.50

Longitudinal Vaper Panel Survey to Measure Attitudes and Behaviours Regarding Vaping Products	POR 047-17	Environics Research Group Limited	$149,831.22
Peer Crowd Analysis and Segmentation for Vaping and Tobacco	POR 074-17	Phoenix SPI	$199,355.45
Perceptions of Drinking Water Quality in First Nations Communities and General Population	POR 052-17	Ekos Research Associates Inc.	$142,990.20
Qualitative Testing of New Health Information Messages and Toxic Statements Text and Designs for Cigarettes Packaging 2018	POR 096-17	Phoenix SPI	$215,112.45
Qualitative Testing of New Health Warnings and Contact Information Taglines for Cigarettes and Little Cigars Tobacco Product Packaging: 2017	POR 028-17	Phoenix SPI	$249,949.22
Seasonal Influenza Vaccination Coverage Survey 2017 to 2018	POR 059-17	Léger Marketing	$110,231.50
Social Media Focus Groups with Youth	POR 075-17	Corporate Research Associates Inc.	$87,371.60
Sugary Drinks Reduction Campaign Focus Groups	POR 034-17	Corporate Research Associates Inc.	$59,217.65
Survey for the Development of a Vaccination Advertising Campaign	POR 022-17	Ekos Research Associates Inc.	$96,354.54
Survey of Canadians' Knowledge and Behaviours Related to Food Safety	POR 035-17	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	$129,998.82
Study of Health Professionals' Awareness and Perceptions of Heat Health Issues and Health Canada Materials 2017	POR 027-17	Léger Marketing	$48,578.70
THC Symbol Focus Testing	POR 065-17	The Earnscliffe Strategy Group Inc.	$62,562.45

Immigration, Refugees and Citizenship Canada			
2016 to 2017 Annual Tracking Study: Qualitative Research	POR 125-16	Ekos Research Associates Inc.	$20,266.55
2017 to 2018 Interim Federal Health Program Provider Survey	POR 080-17	The Earnscliffe Strategy Group Inc.	$113,211.20
2017 to 2018 Qualitative Research About Passport Program Vision of the Future	POR 072-17	Phoenix SPI	$95,195.72
2018 Qualitative and Quantitative Research about Newcomers and Immigrants	POR 091-17	Ipsos-Reid Corporation	$245,328.25
International Experience Canada: Survey of Youth	POR 067-17	Léger Marketing	$44,064.35
Innovation, Science and Economic Development Canada			
Client Satisfaction Survey: Canadian Intelligence Property Office	POR 049-17	Environics Research Group Limited	$147,083.06
National Series of Focus Groups with Small and Medium Business Owners and Self-Employed Canadians	POR 113-17	Quorus Consulting Group Inc.	$101,281.90
Newly Upgraded Automated Name Search (NUANS) Client Profile Consultation and Reporting	POR 114-17	Phoenix SPI	$46,262.20
Study of Online Consumption of Copyright Content: Attitudes Towards and Prevalence of Copyright Infringement in Canada	POR 011-17	Kantar TNS Inc.	$94,920.00
Library and Archives Canada			
TD Summer Reading Club 2017	POR 020-17	AC Nielsen Company of Canada	$39,988.44
National Defence			
Holistic Professional Formation Research	POR 113-16	The Earnscliffe Strategy Group Inc.	-$120.00
Testing Recall of Recruitment Advertising: 2017 to 2018 Campaign	POR 104-17	Corporate Research Associates Inc.	$14,706.95

Views of the Canadian Armed Forces 2018: Tracking Study	POR 076-17	The Earnscliffe Strategy Group Inc.	$140,475.15
National Energy Board			
Questionnaire Design for Post-Hearing Survey: Energy Adjudication	POR 100-17	The Earnscliffe Strategy Group Inc.	$11,955.40
Natural Resources Canada			
Auto Dealership Survey on Electric Vehicles	POR 064-17	Kantar TNS Inc.	$84,997.36
Consumer Attitudes Towards Electric Vehicles	POR 062-17	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	$79,975.75
National Climate Change Adaptation Survey	POR 077-17	The Earnscliffe Strategy Group Inc.	$109,249.81
Public Opinion Research on Natural Resources Issues 2018	POR 057-17	Phoenix SPI	$157,780.21
Public Opinion Research on Natural Resource Issues: Wave 2	POR 121-16	Environics Research Group Limited	$6,000.30
Office of the Superintendent of Financial Institutions Canada			
Office of the Superintendent of Financial Institutions Employee Survey 2017	POR 007-17	Environics Research Group Limited	$49,271.57
Office of the Superintendent of Financial Institutions: Pension Plans Survey 2017 to 2018	POR 013-17	Phoenix SPI	$41,034.82
Property and Casualty Sector Consultation 2017 to 2018	POR 033-17	Pollara	$67,800.00
Offices of the Information and Privacy Commissioners of Canada			
Quantitative Public Opinion Research with Canadian Businesses	POR 029-17	Phoenix SPI	$58,737.40
Parks Canada			
Parks Canada Awareness Tracking Survey 2017 to 2018	POR 004-17	The Earnscliffe Strategy Group Inc.	$129,770.56

Parks Canada National Survey of Canadians	POR 024-17	The Earnscliffe Strategy Group Inc.	$208,233.13
Parks Canada's Advertising Concept Pretesting: 2017 to 2018 National Campaign	POR 039-17	Corporate Research Associates Inc.	$45,188.70
Parks Canada Visitor Feedback Survey	POR 005-17	Ekos Research Associates Inc.	$150,821.10
Pre and Post Evaluations of Parks Canada's 2017 to 2018 National Tourism Advertising Campaign	POR 038-17	Ekos Research Associates Inc.	$64,941.10
Privy Council Office			
Continuous Qualitative Data Collection of Canadians' Views	POR 061-16	Ipsos-Reid Corporation	$934,689.11
Continuous Tracking of Canadians' Views: Quantitative Survey	POR 101-16	Forum Research Inc.	$407,794.40
Diversity and Social Inclusion	POR 026-17	RIWI Corp.	$24,860.00
International Relations Survey	POR 025-17	Elemental Data Collection Inc.	$60,685.75
Public Safety Canada			
Public Opinion Research on Drug-impaired Driving	POR 019-17	Ekos Research Associates Inc.	$175,633.64
Public Services and Procurement Canada			
2017 to 2018 Shared Services Integration Sector: GCdocs Enterprise Project Management Office Client Satisfaction Survey	POR 088-17	Environics Research Group Limited	$29,824.10
Advisory Panel on Government of Canada Quantitative Research	POR 058-17	Sage Research Corporation	$95,106.45
Canada Gazette: 2017 Client Satisfaction Survey	POR 036-17	Léger Marketing	$43,872.19
Communication Procurement Directorate Annual Client Satisfaction Survey	POR 071-17	Environics Research Group Limited	$9,824.22
Contract Security Program: Industry Survey	POR 045-17	Ekos Research Associates Inc.	$14,571.35

GCSurplus: Market Research	POR 087-17	Phoenix SPI	$73,721.20
Media Habits of Minority Language Canadians	POR 084-16	Ekos Research Associates Inc.	$13,698.26
Workplace Renewal Initiative: Performance Measurement	POR 044-17	Leesman Limited	$18,150.00
Royal Canadian Mounted Police			
Royal Canadian Mounted Police 2017 to 2018 Evaluation of the Police Officer Recruitment Advertising Campaign	POR 040-17	Kantar TNS Inc.	$94,648.97
Survey of Canadians' Views of Royal Canadian Mounted Police Policing Services	POR 069-17	Ekos Research Associates Inc.	$74,947.25
Shared Services Canada			
Employee Needs and Preferences for a Digital Workspace	POR 084-17	Environics Research Group Limited	$113,762.75
Status of Women Canada			
Status of Women Scale Validation Study	POR 002-17	Léger Marketing	$43,567.15
Transport Canada			
Oceans Protection Plan: Canadians Confidence in Marine Safety	POR 048-17	Ekos Research Associates Inc.	$187,265.86
Treasury Board of Canada Secretariat			
Service Delivery and Privacy: Public Opinion Research	POR 092-17	Phoenix SPI	$209,862.47
Veterans Affairs Canada			
Advertising Pre-Testing of Veterans Affairs Canada's 2018: Support and Services Campaign	POR 094-17	Léger Marketing	$104,977.00
Advertising Post-Testing of the 2017 Remembrance Campaign	POR 032-17	Ekos Research Associates Inc.	$35,227.75
Attitudes Towards Remembrance and Veterans' Week 2017	POR 030-17	Phoenix SPI	$45,613.66

Canadians' Awareness of Veterans Affairs Canada's Benefits and Services, and Satisfaction with Veterans Affairs Canada Communications	POR 070-17	The Earnscliffe Strategy Group Inc.	$102,512.87
Pre-testing of the 2018 Remembrance Campaign	POR 111-17	Sage Research Corporation	$62,969.25
Veterans Affairs Canada National Survey 2016	POR 043-16	SOM Inc.	$3,542.55

Appendix III: Standing offers for public opinion research services

Standing offers are an efficient way of creating an inventory of pre-qualified suppliers with which federal departments can quickly and easily obtain a contract to get their research projects up and running.

On October 1, 2015, Public Services and Procurement Canada authorized new standing offers for public opinion research services. This included the completion of a multi-phased process involving consultation, open tendering process and bid evaluations. The standing offers cover the following services:

- fieldwork and data tabulation for online surveys (series A)
- fieldwork and data tabulation for telephone surveys (series B)
- qualitative research (series C)
- quantitative research (series D)
- qualitative and quantitative research (series E)

These standing offers are the result of an open and transparent competitive process designed to:

- encourage the participation of all types of public opinion research suppliers, including small, medium and large businesses, and joint ventures from various geographic locations
- ensure that the government has access to a broad range of subject matter expertise and research specializations with various target groups in Canada
- react to a rapidly changing technological environment, allowing for the use of a variety of research methodologies
- include custom qualitative research, quantitative research and a blend of both research approaches

These standing offers are in effect until September 30, 2018, with the possibility of one-year extension periods up until the year 2021.

Fieldwork and data tabulation for online surveys (series A)

Departments may use this standing offer for online surveys for the following services: programming, pretesting, collecting data, tabulating data and providing pretest and end results.

Standing offer holders for series A:

- AC Nielsen Company of Canada
- Advanis Jolicoeur
- Corporate Research Associates Inc.
- Ekos Research Associates Inc.
- IE Market Research Corp.
- Ipsos-Reid Corporation
- Kantar TNS Inc.
- Léger Marketing
- The Logit Group Incorporated

Fieldwork and data tabulation for telephone surveys (series B)

Departments may use this standing offer for telephone surveys for the following services: programming, pretesting, interviewing, tabulating data and providing pretest and end results.

Standing offer holders for series B:

- AC Nielsen Company of Canada
- Advanis Jolicoeur
- Corporate Research Associates Inc.
- Ekos Research Associates Inc.
- Elemental Data Collection Inc.
- Ipsos-Reid Corporation
- Kantar TNS Inc.
- Léger Marketing
- NRG Research Group

Qualitative research (series C)

Departments may use this standing offer for qualitative research for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

Qualitative methodologies such as dyads, triads or one-on-one interviews, focus groups and bulletin board groups may be used to meet the research objectives of specific projects.

Standing offer holders for series C:

- AC Nielsen Company of Canada
- Corporate Research Associates Inc.
- Ekos Research Associates Inc.
- Léger Marketing
- NRG Research Group
- Phoenix SPI
- Pollara
- Quorus Consulting Group Inc.
- Sage Research Corporation
- The Earnscliffe Strategy Group Inc.

Quantitative research (series D)

Departments may use this standing offer for quantitative research for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

Quantitative methodologies such as telephone or online surveys or any other methods, such as mail and in-person surveys, may be used to meet the research objectives of specific projects.

Standing offer holders for series D:

- Ekos Research Associates Inc.
- Environics Research Group Limited
- Forum Research Inc.
- Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel
- Kantar TNS Inc.
- Léger Marketing
- Patterson, Langlois Consultants ad hoc recherche inc., Amanda Parriag, Sylvain Laroche, consultant inc., in joint venture
- Phoenix SPI
- Quorus Consulting Group Inc.
- The Earnscliffe Strategy Group Inc.

Qualitative and Quantitative research (series E)

Departments may use this standing offer for a combination of qualitative and quantitative methods for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

Both qualitative and quantitative methodologies may be used to meet the research objectives of specific projects.

Standing offer holders for series E:

- AC Nielsen Company of Canada
- Ekos Research Associates Inc.
- Environics Research Group Limited
- Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel
- Ipsos-Reid Corporation
- Léger Marketing
- Patterson, Langlois Consultants ad hoc recherche inc., Amanda Parriag, Sylvain Laroche, consultant inc., in joint venture
- Phoenix SPI
- Quorus Consulting Group Inc.
- The Earnscliffe Strategy Group Inc.

Appendix IV: Key public opinion research-related laws, regulations and policies

Laws and regulations

- Financial Administration Act prohibits verbal-only public opinion research reporting
- Library and Archives of Canada Act requires departments to provide written reports to Library and Archives Canada within 6 months of completion of data collection
- Public Opinion Research Contract Regulations standardizes the form and content of contracted public opinion research reports

Policies

- Common Services Policy identifies Public Services and Procurement Canada as a mandatory common service organization for the coordination and contracting of public opinion research
- Contracting Policy requires departments to notify Public Services and Procurement Canada when a public opinion research project may require a contract
- Policy on Communications and Federal Identity ensures that views and interests of the public are considered when government policies, programs, services and initiatives are developed

Directive and mandatory procedures

- Directive on the Management of Communications supports and facilitates implementation of the Policy on Communications and Federal Identity
- Appendix C: Mandatory Procedures for Public Opinion Research provides procedural rules for managing and coordinating public opinion research activities

Contact information

This report provides an overview of the Government of Canada's public opinion research activities contracted between April 1, 2017 and March 31, 2018.

For more information on public opinion research activities, please visit our pages on the Government of Canada website.

If you have any comments or questions, please contact:

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